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# Food Carryout & Delivery: United States

April 2022



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# Table of Contents

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|  |           |
|--|-----------|
| <b>1. Highlights</b>   | <b>4</b>  |
| <b>2. Market Overview</b>  | <b>5</b>  |
| Market Size  | 5         |
| Historical Trends  | 6         |
| Scope  | 7         |
| Food Carryout & Delivery Market by Retailer Category   | 8         |
| Third-Party Delivery Sales   | 10        |
| Expanding Carryout & Delivery: COVID-19 & Beyond   | 11        |
| Ordering Platforms   | 13        |
| In-Person Purchases for Carryout   | 13        |
| Third-Party Ordering vs. In-House Ordering   | 14        |
| Online & Mobile Ordering   | 15        |
| Phone Ordering Remains Important For Small, Independent Restaurants & Older Consumers                            | 16        |
| Foodservice Packaging Opportunities  | 17        |
| Key Consumer Trends  | 18        |
| Opportunities  | 19        |
| Expansion of Carryout & Delivery Options for Children & Families   | 19        |
| Expedited Avenues for Ordering Prepared Meals from Grocery & Convenience Stores                                  | 19        |
| Meal Delivery & Carryout From Restaurants & Retail Stores Can Expand Food Options for Older & Disabled Consumers | 20        |
| Multi-Channel Sales & Expanding Options for Ultimate Convenience   | 20        |
| Virtual Restaurant Experiences in the Metaverse  | 21        |
| Virtual Restaurant Brands  | 21        |
| Drone & Robot/Autonomous Delivery to Save Restaurants Money  | 21        |
| <b>3. Industry Structure</b>   | <b>23</b> |
| Market Participants  | 23        |
| Third-Party Carryout/Delivery Services   | 23        |
| Grubhub  | 24        |
| Uber Eats  | 25        |
| DoorDash   | 25        |
| Aggregator, Reservation, & Review Sites  | 26        |
| Quick Service Restaurants  | 27        |
| Fast Casual Restaurants  | 27        |
| Full-Service Restaurants   | 27        |

|   |           |
|---|-----------|
| Retail Stores (Grocery Stores, Supermarkets, Mass Marketers, Warehouse Clubs, Convenience Stores, etc.) | 28        |
| Direct Marketers & Other Meal Providers (Co-ops, Farmers Markets, Delivery Companies, etc.)             | 28        |
| <b>4. About This Report</b>   | <b>29</b> |
| Scope   | 29        |
| Sources   | 31        |
| Industry Codes  | 32        |
| Resources   | 33        |

# List of Tables & Figures

---

|  |    |
|--|----|
| Figure 1   Key Trends in the US Food Carryout & Delivery Market, 2021 – 2026 | 4  |
| Figure 2   US Food Carryout & Delivery Sales by Type, 2016 – 2026 (US\$ bil) | 5  |
| Table 1   US Food Carryout & Delivery Sales by Type, 2016 – 2026 (US\$ bil)  | 5  |
| Figure 3   US Food Carryout & Delivery Sales by Type, 2016 – 2026 (%)        | 6  |
| Figure 4   US Food Carryout & Delivery Sales by Retailer Category, 2021 (%)  | 8  |
| Table 2   Selected Third-Party Delivery Services & Years Founded             | 24 |
| Table 3   NAICS & SIC Codes Related to Food Carryout & Delivery              | 32 |

# About This Report

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## Scope

This report forecasts US food carryout and delivery sales in nominal US dollars for 2022-2026. To illustrate historical trends, total sales are provided in annual series from 2016 to 2021. Total demand is segmented by type in terms of:

- carryout
- delivery

This report focuses on carryout and delivery of prepared meals and food/beverages. Included order fulfillment methods are:

- curbside pickup
- drive-thru orders
- drive-thru pickup
- in-house delivery
- in-store/on-premises pickup
- in-store/on-premises purchase for takeout
- shipping
- third-party delivery

The food carryout and delivery industry is broad. Establishments selling prepared food and beverage items for carryout or delivery included in this report are:

- quick service restaurants (e.g., McDonald's, Subway, Dairy Queen, Taco Bell, Chick-fil-A, Wendy's, KFC, Domino's, and Starbucks)
- fast casual restaurants (e.g., Chipotle, Boston Market, Panera Bread, Five Guys, Bruegger's Bagels, Noodles & Co, and Jimmy John's)
- full service restaurants, cafeterias/buffets, and bars (e.g., TGI Fridays, Applebee's, Chili's, Olive Garden, PF Chang's, Black Bear Diner, Dave & Busters, Miller's Ale House, Buffalo Wild Wings, and Golden Corral)
- other foodservice establishments (e.g., hospitals, schools, nursing homes, assisted living centers, prisons, catering companies, museums, hotels, motels, cruise ships, stadiums, arenas, zoos, movie theaters, carnivals, and amusement parks – the vast majority of foods available at these establishments are eaten on the premises, however)
- retail establishments, which encompass grocery stores, mass marketers, warehouse clubs, and convenience stores (e.g., Kroger, Safeway, Walmart, Target, Costco, Sam's Club, 7-Eleven, Circle K, and Pilot Flying J)

- direct marketers and other meal providers (e.g., co-ops, farmers' markets, and meal delivery/mail order companies)
- third-parties/off-premises entities preparing or delivering food on behalf of these venues (e.g., ghost kitchens and third-party delivery services such as Instacart, Grubhub, and DoorDash)

Foods and beverages included in the scope of this report are carryout and delivery of:

- any food and beverage sold by foodservice operations/venues such as restaurants, cafeterias, bars, hotels, stadiums, and movie theaters
- site-cooked/prepared, ready-to-eat or ready-to-heat foods and beverages from retailers, such as:
  - rotisserie and fried chicken (often sold by the piece, as a whole bird, or in a family meal container)
  - pizza (both whole pies and individual slices)
  - items sold at a sandwich/salad/soup bar
  - items sold at a sushi bar
  - items sold at a hot food bar
  - single-serve ready-to-eat items (e.g., small cups of fresh cut fruit packed by the store and wrapped sandwiches)
- fresh, prepared meals sold via direct marketers/mail order companies/delivery companies in single servings or family servings that are ready-to-eat or ready-to-heat, including refrigerated items and items that are flash-frozen for shipment

Excluded from the food carryout and delivery numbers in non-foodservice establishments are:

- prepared foods sold for catering to groups/events (e.g., sandwich platters, large containers of macaroni salad, and vegetable/fruit trays)
- frozen, uncooked microwave dinners often known as "TV dinners"
- store-made items that are not cooked/prepared and must be cooked/prepared by the user (e.g., chicken pot pies with uncooked crust and meat, prepared fresh or frozen pizzas that are unbaked, ready-to-cook stir fry kits, meal kits, and bags of fresh salad mix)
- packaged foods or beverages not prepared on site (e.g., bottled water and bags of national or regional branded potato chips)
- general grocery items that are not packaged/presented for consumption on-the-go or at home (e.g., fresh produce, even if a consumer could buy a single apple and eat it with lunch on-the-go)

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth

rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Food Carryout & Delivery: United States* (FF95082) is based on *Food Carryout and Delivery in the U.S.*, a comprehensive industry study published by Packaged Facts. Analysis drew largely on three primary sources of consumer data:

- The February 2022 Packaged Facts National Online Consumer Survey, which includes a panel of 2,000 US adults (age 18 and older) balanced to the national population on primary demographic measures such as age group, gender, geographic region, marital status, race/ethnicity, presence or absence of children in the household, and household income. The November-December 2021 survey (panel of 1,500 adults), October-November 2021 survey (panel of 1,690 adults), August-September 2021 survey (panel of 2,000 adults), June 2021 survey (panel of 2,014 adults), February-March 2021 survey (panel of 2,046 US adults), November-December 2020 survey (panel of 2,000 US adults), August 2020 survey (panel of 1,519 US adults), and April-May 2020 survey (panel of 1,500 US adults) are also used.
- The Fall 2021 MRI-Simmons National Study is a booklet-based survey, conducted across tens of thousands of respondents selected by address-based sampling to represent a statistically accurate cross-section of the US adult population (age 18 and older). Fall surveys from 2016-2021 are used for trending purposes.
- The International Food Information Council Foundation's 2021 Food & Health Survey provides valuable insight into consumers' perspectives on food purchasing decisions, diet and lifestyle choices, snacking, and health benefits of foods, along with insights on other pertinent topics.

Other primary and secondary sources consulted for this report included trade associations; environmental and animal-welfare advocacy groups; third-party credentialing organizations; and trade, business, and consumer publications.

The US Food and Drug Administration and US Department of Agriculture websites provided information on consumption data and regulations affecting foods.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 3 | NAICS & SIC Codes Related to Food Carryout & Delivery**

| NAICS/SCIAN 2017                              |  | SIC                                |                                       |
|---|--|------------------------------------|---------------------------------------|
| North American Industry Classification System |  | Standard Industrial Classification |                                       |
| 492210  | Local Messengers and Local Delivery    | 4215                               | Courier Services, Except by Air       |
| 722310  | Food Service Contractors               | 5812                               | Eating Places                         |
| 722320  | Caterers                               | 5813                               | Drinking Places (Alcoholic Beverages) |
| 722330  | Mobile Food Services                   | 5963                               | Direct Selling Establishments         |
| 722410  | Drinking Places (Alcoholic Beverages)  |                                    |                                       |
| 722511  | Full-Service Restaurants               |                                    |                                       |
| 722513  | Limited-Service Restaurants            |                                    |                                       |
| 722514  | Cafeterias, Grill Buffets, and Buffets |                                    |                                       |
| 722515  | Snack and Nonalcoholic Beverage Bars   |                                    |                                       |

Source: US Census Bureau

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## Resources

### Packaged Facts

*Consumer and Corporate Food Gifting in the U.S.*

*Food Carryout and Delivery in the U.S.*

*Meal Kits: Trends and Opportunities in the U.S.*

*Office Coffee Service in the U.S: Market Trends and Opportunities*

*Online Grocery Shopping in the U.S.*

*U.S. Beverage Market Outlook 2021*

*U.S. Food Market Outlook 2022: Inflation, Supply Chains, Food Trends & the Effects  
on Home Cooking & Grocery Shopping*

### The Freedonia Group

#### Freedonia Industry Studies

*Commercial Refrigeration Equipment*

*Converted Flexible Packaging*

*Corrugated & Paperboard Boxes*

*Food & Beverage Packaging Innovation*

*Foodservice Single-Use Products*

*Global E-Commerce*

*Global Food Processing Machinery*

*Global Packaging Machinery*

*Global Protective Packaging*

*Protective Packaging*

#### Freedonia Focus Reports

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*Bottled Water: United States*

*COVID-19 Market Impact Analysis*

*Commercial Building Construction: United States*

*Dairy & Substitute Products: United States*

*Demographics: United States*

*E-Commerce: United States*

*Fast Food: United States*

*Lodging Services: United States*

*Restaurants & Foodservice: United States*

*Soft Drinks: United States*

#### Freedonia Custom Research

## Trade Publications

*Automatic Merchandiser*

*BeverageDaily*

*Beverage Digest*

*Beverage Industry*

*BevNet*

*Convenience Store News*

*Dairy Reporter*

*Ecommerce Magazine*

*Nation's Restaurant News*

*Restaurant Business*

*Restaurant Hospitality*

## Agencies & Associations

American Beverage Association

International Hotel & Restaurant Association

National Association of Convenience Stores

National Restaurant Association

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration